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**Wealth firm searches for integrations: Show Me Your Stack**
By Rob Burgess
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*Welcome to "Show Me Your Stack," a series from Financial Planning where we catch up with those delivering financial advice to see what tools they rely on to make it happen. Rising client expectations are driving the need for more powerful tech tools. We're digging deep to find out why advisors prefer certain solutions.*

Chris Grellas is the co-founder of ProsperPlan Wealthin Gold River, California. The firm was founded in April and now has around $120 million in assets under management (AUM); two advisors and co-founders, including Grellas; three full-time employees; and three ongoing part-time contractors.

ProsperPlan Wealth partners with NewEdge Advisors, which provides them with an in-house turnkey asset management platform (TAMP), compliance and more.

Grellas said they work with NewEdge Advisors' Investment Management and Trading Team to invest its clients' assets.

"They provide our research, investment models, trading and rebalancing," he said. "This, in turn, helps us run an efficient practice and always has additional sets of eyes on our clients' assets."

Before co-founding ProsperPlan Wealth, Grellas spent nearly a decade with Allworth Financial in Sacramento. For the first few months, he worked as a financial advisory intern, then as an advisor associate for over three years and finally as a financial advisor for nearly six years, before he left to start his firm.

Grellas said his approach is grounded in his Christian faith and a "conviction in treating others in the way I would like to be treated, as taught by Jesus in Matthew 7:12." In his free time, he volunteers with the youth group of City Bible Church of Sacramento.

"I strive to always put my clients' best interests above my own, providing personalized financial planning that aligns with their unique needs and goals,' he said.

In addition to his faith, Grellas said his Greek heritage is also significant to him. That extends from the full rotisserie lamb he prepares for family gatherings to the names of his pets.

"I share my home with four cats named after famous Greeks: Leo, Elsa, Achilles and Phila," he said.

When it comes to his tech stack, though, his primary focus is on integrations and automation. Grellas said he is interested in how advisors are connecting popular tools to ultimately free up more time to serve existing clients or engage with new ones.

"While it's beneficial to learn about individual tech solutions, I'm far more interested in understanding how to integrate and automate my current setup," he said. "The biggest gap I see in advisor tech is the lack of interoperability between features, which could make processes significantly more efficient. My goal is to elevate my practice's efficiency."

*Scroll down the slideshow to see what Grellas feels are some of the most important pieces of ProsperPlan Wealth's tech stack — and why.*

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**CRM: Wealthbox**
"Wealthbox just makes it simple. We have a task of communicating a certain thing that needs to get done. It gets exactly what we need done. Sure, there are some quirks like pulling data. You have to make sure you pull it just right. And it might not be exactly what you want to pull, but for the most part, there's not much in the way of complaints. And as time goes on, they integrate more with more and more apps, which is making it nicer.

"The most important one to integrate with is Orion. It pulls over the data from Orion for the account value. We'll easily see who has what compiled there.

"It would be nice if they could add a little bit more of a custom view so that you can customize what exact data you want to see on a screen when pulling up a client. I think that would be a pretty cool feature to be able to have. But aside from that, no big complaints."

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**Financial Planning: RightCapital**
"They're by far the best financial planning software out there for having the appropriate amount of detail to communicate to a client.

"RightCapital is that perfect sweet spot where it's quick and easy to build an input to do a basic plan, but if you want to dive into the details, you can. But tax planning is really where its power is. It's showing, 'Here's the decisions that you can make and why you need to make them.' For navigating somebody's Roth conversions or pulling from specific accounts at specific times, navigating different brackets, like the Medicare premium brackets, are important. A lot of people miss those. So that's huge.

"And then quantifying the value of the advice. So rather than just saying, 'Hey,

Chris knows what's best,' in RightCapital you can see the actual dollar amount that affects the advice, showing that it is or is not a good decision."

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**Data gathering: PreciseFP**
"We can push the data into the different software we have, whether that's RightCapital, Wealthbox or our forms so that we can fill out client paperwork. Schwab and Fidelity's forms get automatically prefilled by inputting the data there, rather than going to Microsoft Excel and putting it into your own fields, and then having to type up each and every form, it's just automatically done."

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**Communications: Zoom and Zoom phone**
"We love Zoom. The infrastructure is great. We love being able to create an auto-receptionist so that you're navigating clients to the right person. You're putting it through to the right member of our team so it filters to our client service person first, then to us if they're unavailable. As our team expands, we can have more people in that call queue work seamlessly on our phones and computers, so we don't have to have a physical phone. We can use our cellphones. Overall, I couldn't be more thankful."

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**Tax planning: Holistiplan**
"If somebody gives you their tax return from last year or a couple of years' tax returns, you're able to sift through it without having to read the return. It summarizes all the data for you, so you can make really good decisions. I haven't used it as much to plan out the future for tax situations since I primarily used RightCapital, but the numbers match closely on both sides. As an advisor, if you're matching up both and both sources are telling you, 'Yes, this is where they should be at,' then you're going to get pretty close. And then I usually always say, 'Hey, this is what we're seeing. But confirm this with a tax professional.'"

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**Online reviews: Wealthtender**
"I think Wealthtender is a huge opportunity for advisors because they're providing this search engine optimization while having you listed on their website as an advisor. It's like a Yelp for financial advisors. We have a partnership, where we have our profile with them, and we're able to pull all of our Google reviews and get them verified and vetted as testimonials. Recently, testimonials have been approved in our industry if they're vetted appropriately, and then we can list those on our website to be able to show, 'Hey, we are providing great service.' Our clients like it, and it's approved in compliance. But then it provides search engine optimization, which is just giant. It's like a LinkedIn search engine optimization. You type in 'Chris Grellas,' I pop up right

away. Now, Wealthtender has me popped up, so my clients can find me in multiple sources. Then that's linked to my website, adding even more research."

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